



BOARD OF EQUALIZATION

**CUSTOMER SERVICES AND ADMINISTRATIVE
EFFICIENCY COMMITTEE MEETING MINUTES**HONORABLE BILL LEONARD, COMMITTEE CHAIR
450 N STREET, SACRAMENTO

DECEMBER 11, 2007, 9:30 A.M.

ACTION ITEMS & STATUS REPORT ITEMS**Agenda Item No: 1****Title: Electronic Services Projects/Activities Update****Issue/Topic:**

Report on the current status of electronic services projects/activities and the 2007/08 E-filing infrastructure projects and activities.

Committee Discussion:

Committee Chair Bill Leonard opened the Committee meeting by introducing the agenda items and referred the Board Members to the Committee materials that were distributed prior to the meeting. Mr. Leonard asked Ms. Hammond and Mr. McGuire to give the first update.

Mr. Jeff McGuire, Chief, Tax Policy Division/Sales and Use Tax Department highlighted some of the projects/activities included in the Electronic Services Update memo dated November 20, 2007.

He reported that a new log-in option for taxpayers to file their returns was added in November. This option allows taxpayers to go straight to filing a return easily by using their account number and a unique "express login code" for their account. The express login code is printed on each tax return. They can also give their return to their accountant who can file on their behalf.

Also in November, a third payment option – pay by check was added. This allows taxpayers to file their return electronically but mail their payment to the Board. They can also have their accountant file on their behalf and have the accountant give them a printed copy of the voucher and confirmation page to mail with the check.

Mr. McGuire reported on the status of expanding e-filing to mandatory EFT accounts and multiple location accounts (Schedules B and C). Both of these efforts are currently on schedule for completion in April and July 2008, respectively. Once completed over 97% of sales and use tax payers will be eligible to e-file.

Mr. McGuire commented the key to success and increase in participation with the e-filing program is heavily dependent upon outreach and marketing by field office staff. To support such efforts, an E-Services Contact position has been established in each of the district offices to act as the office subject matter expert on e-services, and to be the lead on promoting e-services to staff and the public. E-filing orientations for all district staff are currently in process and are expected

to be completed in January.

He added, that as part of the field office orientations, a new “combined registration” process where staff will register new taxpayers as e-clients at the same time they issue a seller’s permit is being rolled out. The idea is to get new taxpayers set up use e-services from the start.

Mr. McGuire mentioned other outreach activities this year included participation in a number of outreach efforts with other practitioner groups and FTB and EDD over the past couple of months.

He reported so far this fiscal year there has been a 50% increase in the number of E-filers compared to the same period last fiscal year.

Mr. Leonard was pleased to hear of the progress and outreach efforts. He confirmed with Mr. McGuire that the timeframe for the mandatory EFT accounts would be April and multiple locations would be in July.

Committee Chair thanked Mr. McGuire for the report, and asked the other members for comments or questions. With no other comments, he moved on to the next Committee agenda item.

Committee Action/Recommendation/Direction:

The report on the current status of Electronic Services Projects/Activities and the 2007/08 E-filing infrastructure update was presented as an information resource. Therefore, no action was required.

Agenda Item No: 2

Title: Tax Appeals Publications-Update on Revisions

Issue/Topic:

Report on the current status of revisions to publications offered by the Board of Equalization to assist taxpayers with appeals/hearing process.

Committee Discussion:

Committee Chair Bill Leonard started the discussion by confirming with Ms. Hammond that a list of publications including proposed revision dates had been distributed to the Board members.

Ms. Hammond, Division Manager, Outreach Services Division/External Affairs Department confirmed a memo dated November 28, 2007 was sent to the Board Members with a list of tax appeals publications and the proposed revision dates.

Mr. Leonard encouraged the other members and their staff to review the list of publications and submit any changes to the list (additions or deletions) to Ms. Hammond.

Ms. Yee expressed an appreciation for the update on the publications revisions. She asked for clarification on the date with respect to the submission to the Rules of Tax Appeals with the Office of Administrative Law.

Ms. Diane Olson, Chief, Board Proceedings Division, reported that the Rules of Tax Appeals were submitted to the Office of Administrative Law on November 20, 2007. Board Proceedings

anticipates OAL approval by January 4, 2008, with an effective date of February 3, 2008 (30 days after OAL approval).

Ms. Yee commented that would allow about a month for revisions.

Mr. Leonard agreed and commented that the programs work together as soon as possible.

The Committee Chair thanked Ms. Hammond and Ms. Olson for the report. With no other comments moved adjourned the Committee.

Approved: /s/ Bill Leonard
Honorable Bill Leonard, Committee Chair

/s/ Ramon J. Hirsig
Ramon J. Hirsig, Executive Director

BOARD APPROVED

At the December 12, 2007 Board Meeting

/s/ Diane Olson
Diane Olson, Chief
Board Proceedings Division